

Instructions Please Read

Dear Taxpayer:

Attached please find your **Clause 22- Disabled Veteran Exemption** Application for Fiscal Year 2019. A New Application is required each year.

The filing deadline for Fiscal Year 2020 is April 1, 2020. This deadline cannot be extended or waived by the Board of Assessors for any reason.

You must complete the following sections of the application in order for the Assessors' office to process your application.

- 1) **Section A (Ownership as of July 1, 2019)**
- 2) **Section B (Exemption Status as of July 1, 2019)**
- 3) **Section C (Signature)**

If first year of application, please provide Certificate of Disability from U.S. Dept. of Veterans Affairs of branch of service.

A Certificate of Disability is required each year if disability rating is 100%.

For properties held in a Trust only-

The applicant must be a Trustee of the Trust AND also be a Beneficiary of the Trust.

Enclose the following (unless on file with the Assessors' Office):

- ☐ A copy of the entire Trust Document, including the Schedule of Beneficiaries.
- ☐ A copy of any amendments made to the trust and or Trustees since July 1, 2018.
- ☐ A copy of any amendments made to the Schedule of Beneficiaries.

Your application cannot be processed unless it is completed and all required documents have been received.

If you have any questions, please contact the Assessors' office at (781) 316-3050



Town of Arlington
Assessor's Office
(781) 316-3050

ARLINGTON

VETERAN

FISCAL YEAR 2020 APPLICATION FOR STATUTORY EXEMPTION

General Laws Chapter 59, § 5

THIS APPLICATION IS NOT OPEN TO PUBLIC INSPECTION
(See General Laws Chapter 59, § 60)

Assessors' Use Only
Date Received:
Parcel ID:
Acct. No.:
Bill No.:

Return to: Board of Assessors
Arlington Town Hall
730 Massachusetts Avenue
Arlington, MA 02476

Must be filed with the Assessors Office on or before **April 1, 2020**
This deadline cannot be extended or waived by the Board of Assessors for any reason.

INSTRUCTIONS: Complete the following. Please print or type.

A. IDENTIFICATION. Complete this section FULLY.

Name of Applicant _____

Telephone Number _____ Marital Status _____

Legal Residence (Domicile) on July 1, 2019 _____ Mailing Address (if different) _____

No. Street City/Town Zip Code _____

Location of Property: _____ No. of Dwelling Units 1 ☐ 2 ☐ 3 ☐ 4 ☐

Did you own the property on July 1, 2019? Yes ☐ No ☐

If yes, were you: Sole Owner ☐ Co-Owner with Spouse Only ☐ Co-owner with Others ☐

Was the property subject to a trust as of July 1, 2019? Yes ☐ No ☐

If yes, please attach trust instrument including all schedules, unless you provided these previously.

Have you been granted any exemption in any other city or town (MA or other) for this year? Yes ☐ No ☐

If yes, name of city or town _____ Amount exempted \$ _____

B. EXEMPTION STATUS. Check the status that applies to you and complete the questions that follow.

☐ VETERAN

☐ VETERAN'S SPOUSE Veteran's Name _____

Was the property the veteran's domicile as of July 1, 2019? Yes ☐ No ☐

If no, where does the veteran reside? _____

☐ VETERAN'S/SERVICEMEMBER'S/ NATIONAL GUARD MEMBER'S SURVIVING SPOUSE or SERVICEMEMBER'S SURVIVING PARENT Deceased Veteran's/ Servicemember's / National Guard member's Name _____

If first year of application, attach copy of death certificate.

If you are a surviving spouse, have you remarried? Yes ☐ No ☐

Date Enlisted/ Inducted _____ Date Discharged _____

Type of Discharge _____ If first year of application, attach copy of discharge papers.

Military Decorations or Awards _____

Please continue on reverse

Did the veteran/ service/ national guard member live in Massachusetts for at least 6 months before entering the service?

Yes ☐ No ☐ If no, list places and dates where veteran or member lived during the last 3 years or if deceased, the 3 years prior to death.

Address

Dates

Continue list on attachment in same format as necessary

If yes to any of the next 2 questions and if first year of application, (1) attach documentation from U.S. Department of Veterans Affairs, branch of service and (2) list above places and dates where surviving spouse has lived during the last 3 years.

Is the servicemember or national guard member missing in action and presumed dead? Yes ☐ No ☐

Was the proximate cause of the veteran's, servicemember's or national guard member's death due to an active duty injury or illness? Yes ☐ No ☐

If yes to next questions and first year of application, attach documentation for U.S. Dept. of Veterans Affairs or branch of service.

Has the servicemember or veteran ever been a prisoner of war? Yes ☐ No ☐

If yes to the next question and first year of application, attach Certificate of Disability from U.S. Dept. of Veterans Affairs or branch of service.

Does the veteran have a 100% disability rating for service-connected blindness? Yes ☐ No ☐

If yes to any of the next 3 questions and if first year of application, attach Certificate of Disability from U.S. Dept of Veterans Affairs or branch of service. If exemption granted previously, attach certificate only if disability rating is 100% or has changed.

Does the veteran have a service-connected disability? Yes ☐ No ☐

Has the veteran acquired "specially adapted housing"? Yes ☐ No ☐

Is the veteran a paraplegic Yes ☐ No ☐

C. SIGNATURE. Sign here to complete the application.

This application has been prepared or examined by me. Under the pains and penalties of perjury, I declare that to the best of my knowledge and belief, this return and all accompanying documents and statements are true, correct and complete.

Signature

Date

If signed by agent or Power of Attorney, attach copy of written authorization to sign on behalf of applicant.

This application must be returned to the Arlington Assessors' Office on or before April 1, 2020.

This deadline cannot be extended or waived by the members of the Board of Assessors or the staff of the Assessors Office for any reason. If your application is not filed timely, you lose the rights to an exemption and the Board of Assessors cannot by Massachusetts State Law, grant you one.



Board of Assessors
Arlington Town Hall
730 Massachusetts Avenue
Arlington, MA 02476
(781) 316-3050
assessors@town.arlington.ma.us

TAXPAYER INFORMATION ABOUT PERSONAL EXEMPTIONS

PERSONAL EXEMPTIONS. You may be eligible to reduce all or a portion of the taxes assessed on your domicile if you meet the qualifications for one of the personal exemptions allowed under Massachusetts law. Qualifications vary, but generally relate to age, ownership, residency, disability, income or assets. You may be eligible for an exemption if you fall into any of these categories:

- Legally blind person
- Veteran with a service-connected disability
- Surviving spouse of servicemember, national guard member or veteran who died from active duty injury or illness
- Surviving spouse
- Minor child of a deceased parent
- Senior citizen age 70 and older (65 and older by local option)

More detailed information about the qualifications for each exemption may be obtained from your Board of Assessors.

WHO MAY FILE AN APPLICATION. You may file an application if you meet all qualifications for a personal exemption as of July 1. You may also apply if you are the personal representative of the estate, or trustee under the will, of a person who qualified for a personal exemption on July 1.

WHEN AND WHERE APPLICATION MUST BE FILED. Your application must be filed with the Assessors Office on or before April 1, or 3 months after the actual tax bills were mailed for the fiscal year, whichever is later. An application is filed when (1) received by the Assessors Office on or before the filing deadline, or (2) mailed by United States mail, first class postage prepaid, to the proper address of the Assessors Office, on or before the filing deadline, as shown by a postmark made by the United States Postal Service. **THIS DEADLINE CANNOT BE EXTENDED OR WAIVED BY THE BOARD OF ASSESSORS OR ANY STAFF OF THE ASSESSORS OFFICE, FOR ANY REASON. IF YOUR APPLICATION IS NOT TIMELY FILED, YOU LOSE ALL RIGHTS TO AN EXEMPTION AND THE ASSESSORS CANNOT BY LAW GRANT YOU ONE.**

PAYMENT OF TAX. Filing an application does not stay the collection of your taxes. In some cases, you must pay all preliminary and actual installments of the tax when due to appeal the Board of Assessors' disposition of your application. Failure to pay the tax when due may also subject you to interest charges and collection action. To avoid any loss of rights or additional charges, you should pay the tax as assessed. If an exemption is granted and you have paid the entire year's tax, you will receive a refund of any overpayment.

ASSESSORS DISPOSITION. Upon applying for an exemption, you may be required to provide the Board of Assessors with further information and supporting documentation to establish your eligibility. The Board of Assessors has 3 months from the date your application is filed to act on it unless you agree in writing before that period expires to extend it for a specific time. If the Board of Assessors do not act on your application within the original or extended period, it is deemed denied. You will be notified in writing whether and exemption has been granted or denied.

APPEAL. You may appeal the disposition of your application to the Appellate Tax Board, or if applicable, the County Commissioners. The appeal must be filed within 3 months of the date the Board of Assessors acted on your application, or the date your application was deemed denied, whichever is applicable. The disposition notice will provide you with further information about the appeal procedure and deadline.